Product Cheat Sheet

Refreshed: July 2025

INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

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INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

Navigation

17 Training & Development Products :

- Academy
- IT Leadership Masterclass
- IT Management Accelerators
- Women Leading IT
- Management Fundamentals
- AI Workforce Development
- Cybersecurity Workforce Development

Blueprint

Selling

Positioning

- Road tested, best practice methodologies, tools and templates so you never need to start from scratch, whether that's an executive presentation or policy.
- Our research is published as ppt, word, excel and we encourage you to customize them to fit your unique environment.
- Unlimited access, no pay walls.

Triggers

- Need documentation
- Not sure how to start
- Concern about gaps, missed areas
- Lack experience with project
- Investing significant amount of time into methodology research or building tools
- Frustration with lack of guidance from current research partner (if applicable)

Problem Questions

- Is lack of documentation a challenge? Why?
- Are you concerned that you might miss a key step?
- Do you know how to get started?
- Have you experienced challenges executing projects due to lack of appropriate skillset?
- Have you found it time consuming to build X from scratch?
- One of the issues we hear from our members who also leverage Gartner is that it's a challenge to understand which resources are most applicable and when/where/how they should be used to complete a project. Is that a challenge you're facing? (only applicable if Gartner members)

Solution Questions

- Would you be interested in seeing a fully built best practice methodology that's been road tested by your peers already so that you can learn from their successes and avoid gaps?
- Would it be helpful if you and your team had unlimited access to the research & tools needed to complete X project rather than building them yourself?
- Are you looking for ways to avoid starting from scratch on X?
- Would it help if your team had access to ready-made best practice tools that could be customized to your organization?

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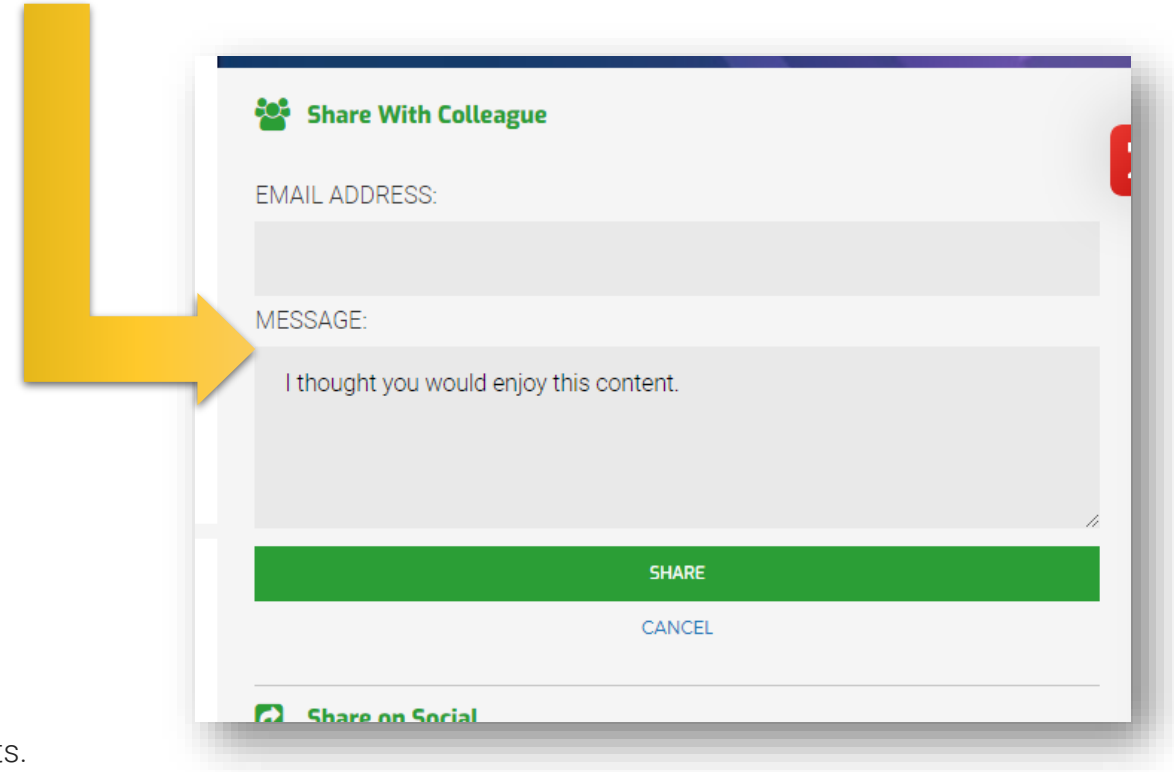
Blueprint

Engaging

How to Use

- Use the share with colleague feature to share blueprints.
- When a client/prospect opens the email, you will be notified.
- You can check opens by searching here:

Forward Feature Stats | Info-Tech Research Group



When to Recommend

- Recommend on Service Calls, Quarterly Business Reviews, and showcase them on calls with projects.

- Send members blueprints you think will resonate. We're publishing new content weekly.

Guided Implementation

Selling

INFO-TECH RESEARCH GROUP — SALES ENABLEMENT —

Positioning

- Work with the same analyst through a series of 1 hour working sessions from start to finish through critical milestones
- Learn from the successes and mistakes of those who've done these projects before
- Our research is published as ppt, word, excel so that you can customize them with analyst assistance
- Unlimited access, no pay walls with advisory level+

Need Extra Help? Speak With An Analyst

Get the help you need in this 3-phase advisory process. You'll receive 9 touchpoints with our researchers, all included in your membership.

Guided Implementation 1:
Establish Business Context and Value

Call 1: Understand what a data strategy is and why it needs to be aligned with the organizational strategy.

Call 2: Identify the business drivers that necessitate optimizing the data strategy.

Call 3: Create a tactical plan to optimize data architecture across Info-Tech's five-tier logical data architecture model.

Guided Implementation 2:
Ensure You Have a Solid Data and Resources Foundation

Call 1: Understand the key enablers of data management as well as the required resources portfolio: people and skill sets.

Call 2: Determine the current state of your environment: data management enablers, people and data organizational structure, and data culture.

Call 3: Understand the risk and feasibility as they relate to the data strategy.

Guided Implementation 3:
Formulate a Sustainable Data Strategy

Call 1: Determine the target state and initialize the corresponding roadmap for the data strategy.

Call 2: Understand the role of effective change management and communication in operationalizing the data strategy.

Call 3: Consolidate and refine all findings – formulate the data strategy document for senior leadership consumption.

Guided Implementation

Selling

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Trigger Words

- Not sure how to start
- Concern about gaps, missed areas
- Lack experience with project
- Investing significant amount of time into methodology research

Problem Questions:

- Are you concerned that you might miss a key step?
- Do you know how to get started?
- Have you experienced challenges executing projects due to lack of appropriate skillset?
- Are you struggling with resource capacity? (not enough time/people to get work done on time/budget)

Solution Questions:

- Have you considered leveraging an experienced partner to ensure no gaps are missed? To develop team?
- Would you be interested in having unlimited access to a SME that would help you throughout every phase of your project be useful?
- Would you find it valuable to be able to partner with the same analyst over the course of a project?

Guided Implementation

Engaging

How to Book

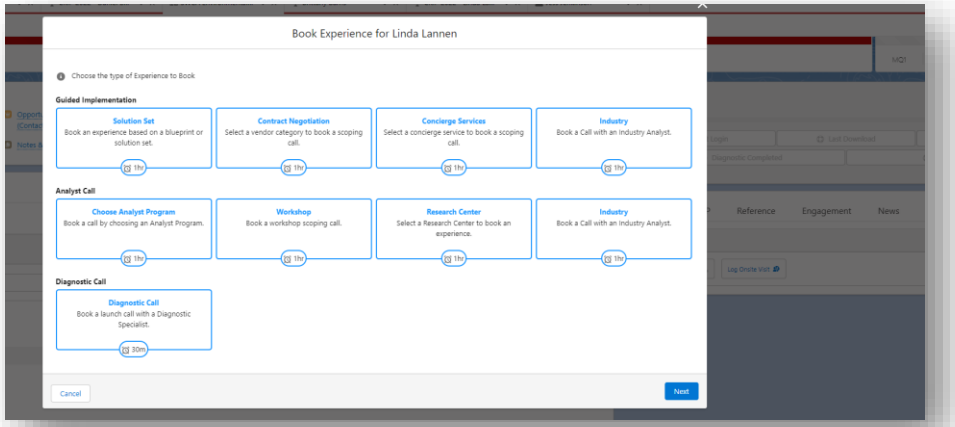
- Ensure they have access to ITRG services.
- Navigate to the SFDC contact and select the ‘Book Experience’ Button
- Select ‘Solution Set’
- Search and Select the Blueprint
- Select a time/date.
- Select the Research Analyst
- Input notes in the ‘Description Box’

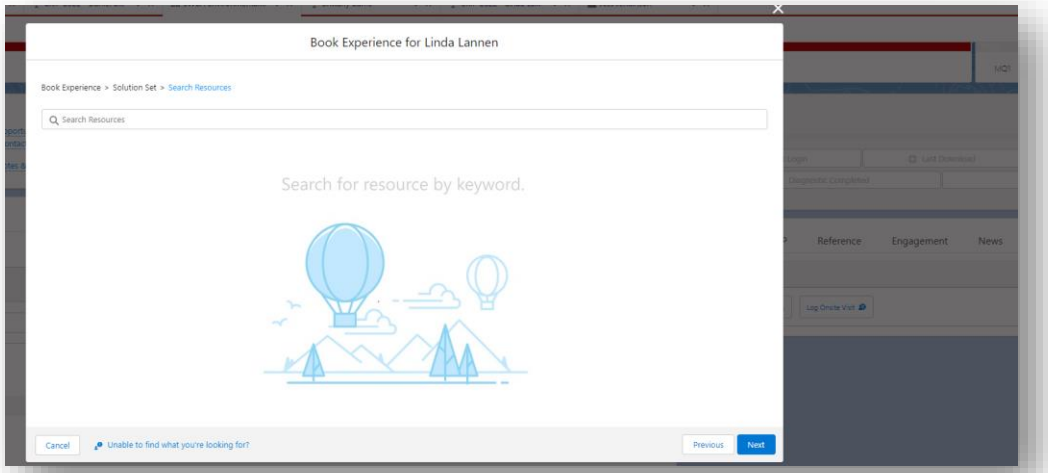
Video: How to Book a Guided Implementation

When to Recommend

- Anyone with an advisory+ membership who needs a structured approach or assistance with a project.

- Those who are ‘doing it themselves’ but not making much progress.


Book Experience for Linda Lannen
Choose the type of Experience to Book
Guided Implementation
Solution Set
Book an experience based on a blueprint or solution set.
Contract Negotiation
Select a vendor category to book a scoping call.
Concierge Services
Select a concierge service to book a scoping call.
Industry
Book a Call with an Industry Analyst.
Analyst Call
Choose Analyst Program
Book a call by choosing an Analyst Program.
Workshop
Book a workshop scoping call.
Research Center
Select a Research Center to book an experience.
Industry
Book a Call with an Industry Analyst.
Diagnostic Call
Diagnostic Call
Book a launch call with a Diagnostic Specialist.
Cancel
Next



Workshops

Selling

Positioning

Workshops are one-week collaborative problem-solving engagements that result in practical and actionable deliverables. We deliver on four key types of workshops: strategic, process, training, and technology.

A Proven, Road-Tested Methodology	Streamline your project timeline with specific and defined outcomes (project plan, roadmap, strategic document, operational document, etc.). Speed-up decision making with collaborative discussions and activity-based exercises. Built off world-class research and industry best practices.
An Intense, Collaborative Learning Experience	Drive consensus with key stakeholders through productive conversations facilitated by Info-Tech experts. Leverage Info-Tech's experience and expertise to upskill teams.
No-hassle Negotiating And Scoping	Simple pricing model – same flat rate across all projects. Pre-scoped, focused engagements to ensure progress at the end of the engagement.

Workshops

Selling

Trigger Words and Phrases

- Tight deadlines
- Lack of experience
- High-Risk Initiative (BCP, DRP)
- Strategic Planning Initiatives (IT, digital, data, security, etc.)

Problem Questions

- Has it been challenging to gain consensus?
- Are you concerned about the timeline?
- Are you concerned about the maturity of the team impacting the final product?
- Have you done this before?

Solution Questions

- Have you considered leveraging a neutral 3rd party to facilitate the completion?
- Would you be interested in exploring ways we could help you to execute this in days instead of weeks/months?
- Do you think that an external party would help drive consensus?
- Are you considering a 3rd party, consultant or specialist?

Workshops

Engaging

How to Book – Workshop Engagement Process

To begin the booking process:

Reach out to - Workshops@infotech.com

Workshops

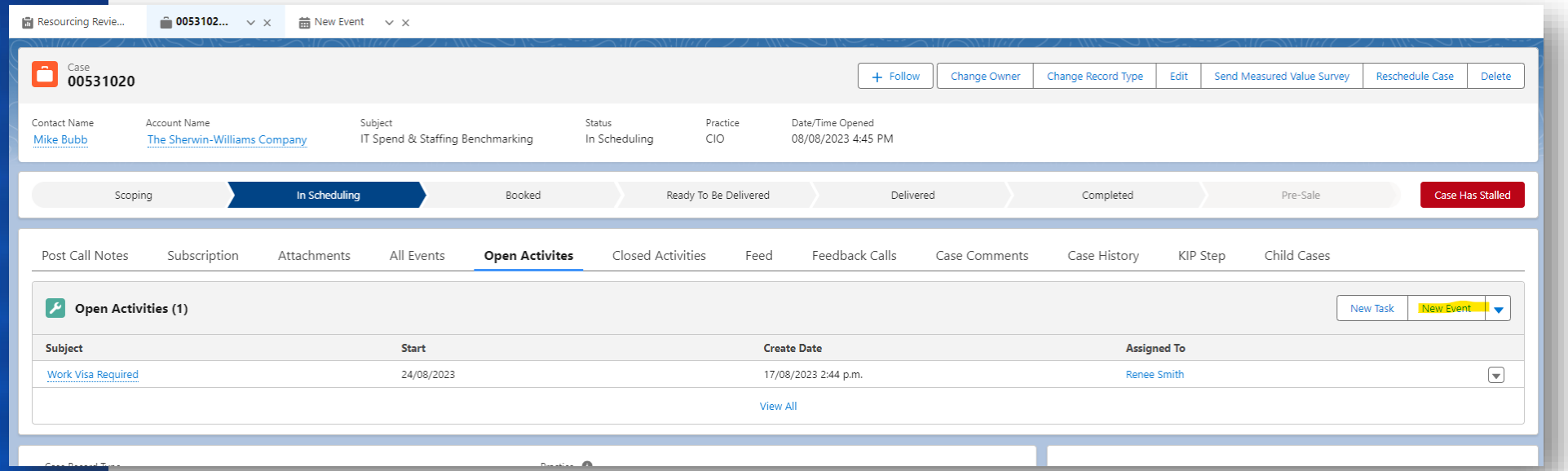
Case Admin

Case Admin

With a Credit:

Book calls for workshops within the workshop case that holds the associated entitlement that the member plans to use (i.e., if they have an online and onsite workshop, but plan to have the workshop onsite, use the workshop case that's tied to the onsite credit).

Within the workshop case, the rep can go to the "open activities" section and create a "new event":



Workshops

Case Admin

Case Admin

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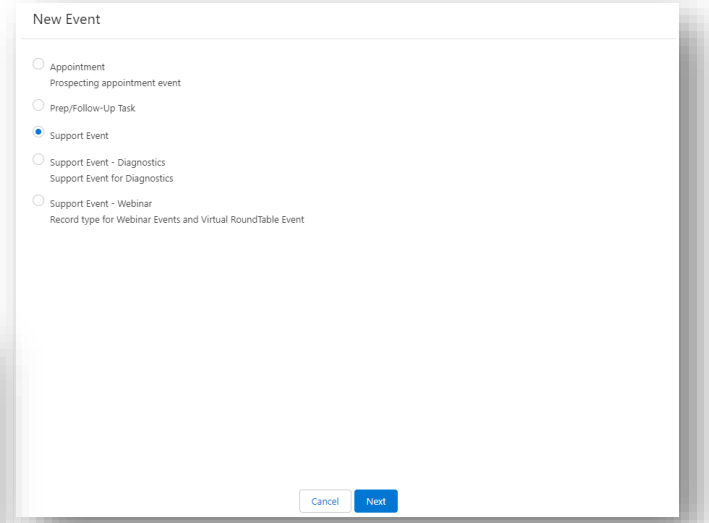
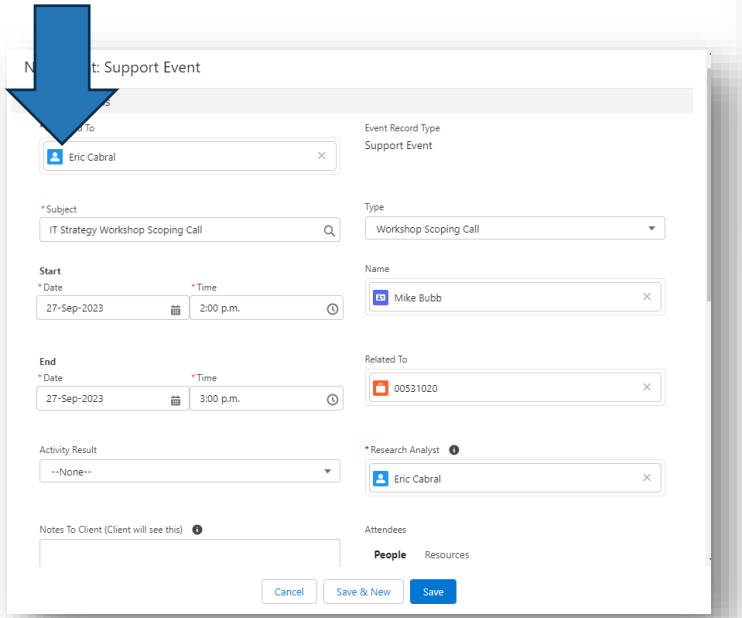
With a Credit:

Then, set it up as a Support Event:



Then, fill in the call information accordingly:



Without a Credit:

If the member doesn't have a workshop credit, or they aren't sure which credit they would like to use for the workshop, then it can be setup as a regular meeting support call.

How to Video: Book a Meeting Support Event

Diagnostics

Selling

Positioning

IT Diagnostics are online survey tools to collect key stakeholder inputs and data points to form actionable insights and set clear priorities with stakeholders through the organization and within IT.

Data Insights Report	Evaluate IT stakeholder satisfaction with our strategic diagnostics. Ensure functional and operational excellence with our technical diagnostics. Get an actionable executive-facing report to get alignment on the following actions.
Industry and YoY Benchmarking	Reveal the actual state of your IT services, processes, spending, and staffing and how it aligns with your priorities and resources. Compare your data to peer data to get a reference. Get insights on industry challenges, where your peers are performing better, and what success looks like.
Advisory Expertise	Consult with an expert to get guidance on how to interpret your results and build a plan of action.

Diagnostics Selling

How to Pitch and Gain Agreement with Diagnostic Talk-Tracks: Here

Triggers

- Lack Business alignment
- Lack Stakeholder buy-in
- Strategic Planning – IT Strategy, Security, Data, Infrastructure, Applications, PPM

Problem Questions

- Is it challenging to ensure IT is aligned with the business?
- Do you find it a challenge to understand the perception the business has of IT?
- Are you struggling to define success metrics in IT?
- Are you concerned about end user or stakeholder sentiment towards IT? How you stack up against your peers?
- Do you find it challenging to collect the data you need to make strategic decisions for IT and assess internal/external resources?

Solution Questions

- Have you considered collecting data to inform decisions?
- How have you gathered this data in the past? Have you considered alternatives to traditional interviews?
- Have you ever thought to use business satisfaction as a key IT success metric?
- Would it be valuable to translate internal data into actionable outcomes? How could you see yourself doing this?
- Would you be interested in having access to a suite of pre-built survey diagnostic tools to help you assess the current state of IT, support data driven decision making, and help you validate your next steps with actionable recommendations?

Diagnostics

Engaging

How to Schedule a Diagnostic:

1) Scoping Call

a) Scheduled by: Sales Rep
b) Booked via outlook.
c) On the call, go through sample deliverable, product expectations and confirm best fit.
d) Book the launch call.

2) Launch Call

a) Launch Call between Diagnostic Coordinator and Member
b) Ensure “Key Items” are confirmed in case description: Intended Launch Date, Is this Scoped? (Y/N), Is this for a Workshop? (Y/N), Workshop Date (if answered yes for workshop), Type of Membership, Additional Details
    a) *These are required because some members need to complete Diagnostics for some Workshops.*

3) Results Call

a) Scheduled by: Diagnostic Coordinator
b) After survey closure, Diagnostic Coordinator will schedule in a Results Call between member
c) EA/EC or research analyst to showcase results, discuss data interpretation & next steps

Diagnostic Delivery List - 2023.xlsx

How to Book Diagnositc

Logistics Chart FAQs	Overall	CIO Business Vision	CIO-CXO Alignment	MGD	End User	APA	IT Staffing	Security (Step 1)	PPM (Step 1)	Data Quality	Reporting & Analytics
Survey Length (Average time)	~15 mins	30 questions 15 mins	18 questions 15-20 mins.	3 questions per process (180 questions) 15-20 mins.	13 questions 10 mins.	5 or 6 questions per app. 15 mins.	6 Questions + 5 per IT Function 20 mins	60 questions 20-25 mins.	24 questions. 15-20 mins.	7 Questions 5-10 mins.	10 Overall + 6 per Report
Survey Audience	Important to involve the right people, rather than the right number of people.	Business Leaders (Manager level and above, outside IT)	Head of IT & Head of the Business	IT Management & Leadership	Company wide/ End users (Anyone serviced by IT or using applications)	Company wide/ End users (Anyone serviced by IT or using applications)	Everyone in IT, including CIO	IT Security Leaders, CISO or CIO	Head of PMO or CIO	Primary users of the Application	Primary users of the Reports
Ideal participation rate		75%+	100%	100%	60%+	60%+	100%	100%	100%	75%+	75%+
Are confidential reports available (no participant names)?	Confidential reports are available for some programs, none are 100% anonymous.	Yes. Q28 is 100% anonymous.	No	No	Yes	Yes	No	No	No	No	No
Who sends the survey links out?		Info-Tech	Head of IT	Head of IT	Head of IT	Head of IT	Info-Tech	Head of IT or CISO	Head of IT or PMO	Info-Tech	Info-Tech
What is shared?		Unique links via automated email	Unique Survey links	Shareable Registration Link	Shareable Registration Link	Shareable Registration Link	Unique links via automated email	Shareable Registration Link	Shareable Registratio n Link	Unique links via email	Unique links via email
Link to ITRG page		CIO Business Vision	CIO-CXO Alignment	MGD	End User	APA	IT Staffing	Security	PPM	Data Quality	Reporting & Analytics
Multi-lingual options?		Yes	No	Yes	Yes	No	Yes	No	Yes	No	No
Is Benchmarking Data Available?		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Built in year-over-year comparison?		Yes	No	No	Yes	Yes	No	Yes	Yes	No	No
Required Prep Documents	Whitelist our survey email & IP.	Participant spreadsheet.	Participant List (names, emails & full titles of both are needed)	Participant spreadsheet (optional)	Department template & Reviewed Invitation	Application Inventory	Participant spreadsheet	None	None	Participant spreadsheet	Participant spreadsheet
Ability to customize survey questions?		No, We can make changes to terminology only.	No, Questions are tied closely to COBIT.	No	No, We can make changes to terminology only.	No	No, Least ability to customize.	No	No	No	No
Additional Notes	Typical Diagnostic Cycle is 4-6 weeks					Application limit: 10 per user group/department					

Languages Offered

Diagnostic	English	French (Canadian)	French	German	Spanish	Chinese	Japanese	Korean	Polish	Russian	Swedish	Finnish	Portuguese
CIO Business Vision	X	X	X	X	X	X	X	X					X
CIO-CEO Alignment	X												
Assess Core IT Processes	X	X											
IT Staffing Assessment	X	X			X								
End-User Feedback	X	X		X	X	X			X	X	X	X	X
Security	X												
PPM Current State	X	X											X
PPM Customer Satisfaction	X	X											
Application Portfolio Assessment	X												
Data Quality	X												
Reporting and Analytics	X												

*Results Reports are provided in English only.

Concierge Services

Selling

Positioning

Concierge Services are pre-scoped, mini consulting engagements with our experts that provide a tangible outcome.

IT Strategy Review & Visualization	Get a clear, concise, and compelling business-facing presentation of your IT strategy document. Share your IT strategy with confidence.
Document review	Get a quick turnaround on document reviews before presenting them. Improve the quality of your documents with our experts' input.
Custom vendor landscape	Understand the software marketspace with concise analysis, designed to fit your software needs. Get a vendor snapshot created by our analysts and based on secondary research.

Concierge Services

Selling

Trigger Words and Phrases

- Lack capacity
- Third party validation
- Review needed to check for gaps
- Current state assessment
- Visualization service
- Tight timeline

Problem Questions

- Are you concerned that your current document X may be outdated or need revising?
- Are you struggling with how to present X to your stakeholders?
- Do you have any concerns about the quality of your RFP? Are you worried about the volume or quantity of vendor responses you will get?

Solution Questions:

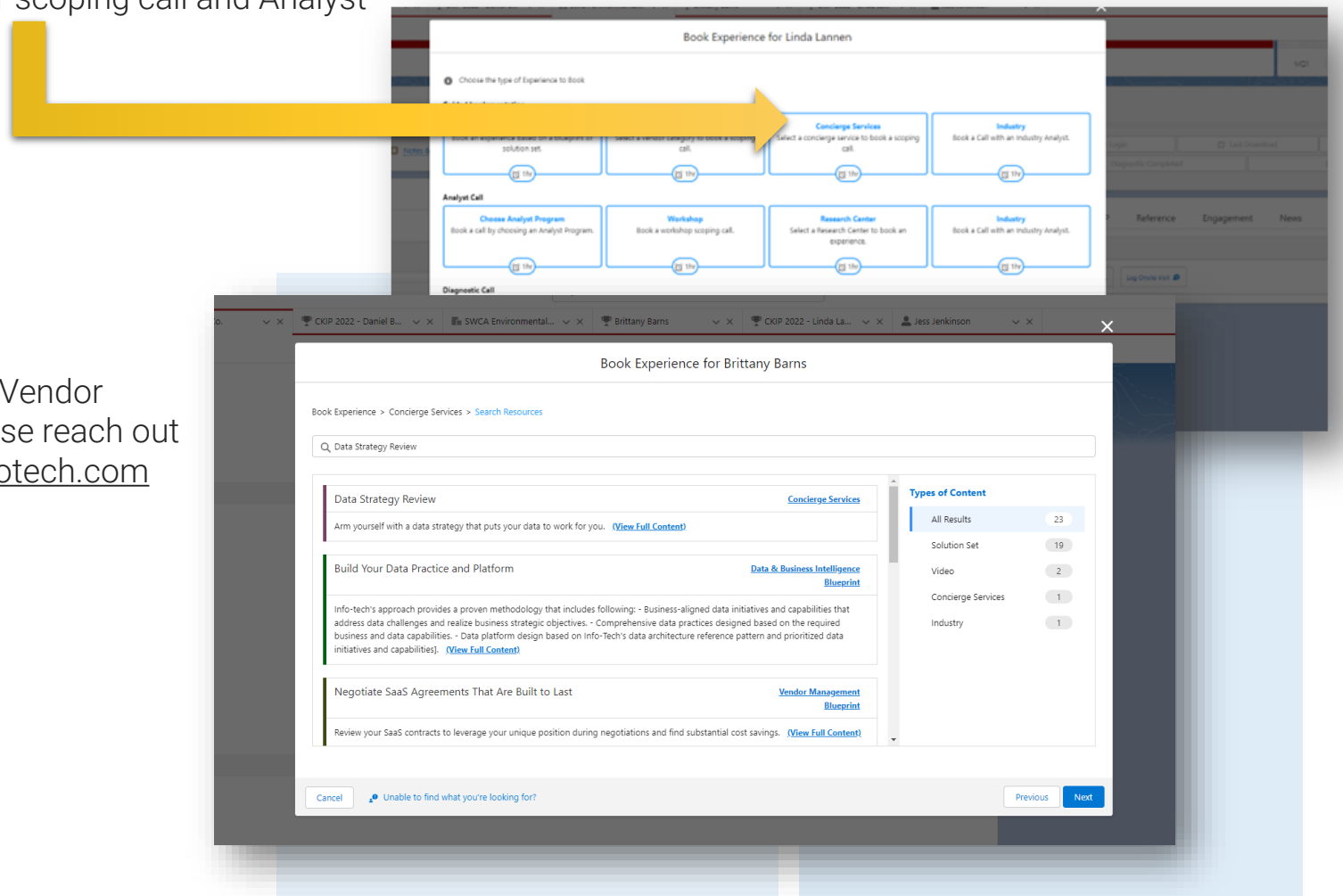
- Would it be valuable if you were able to partner with a SME who would spend a few days reviewing X and then provide you with a deliverable & recommendations?
- Would you be interested in having one of our SMEs build your executive facing presentation? Keynote?
- Would you be interested in having a SME build a custom vendor landscape for that niche market?

Concierge Services

Engaging

How to Book

- Determine if they are entitled to the service with ITRG.
- Navigate to the SFDC contact and select the ‘Book Experience’ Button
- Select ‘Concierge Services’ under ‘Guided Implementation’
- In ‘Publication’ search for the name of the concierge service you’re looking for. Follow the naming convention from the website.
- Select date for scoping call and Analyst
- Add Notes


Book Experience for Linda Lannen
Concierge Services
Industry
Analyst Call
Choose Analyst Program
Workshop
Research Center
Industry
Diagnostic Call
Book Experience for Brittany Barns
Book Experience > Concierge Services > Search Resources
Data Strategy Review
Data Strategy Review
Concierge Services
Arm yourself with a data strategy that puts your data to work for you. (View Full Content)
Build Your Data Practice and Platform
Data & Business Intelligence Blueprint
Info-tech's approach provides a proven methodology that includes following: - Business-aligned data initiatives and capabilities that address data challenges and realize business strategic objectives. - Comprehensive data practices designed based on the required business and data capabilities. - Data platform design based on Info-Tech's data architecture reference pattern and prioritized data initiatives and capabilities]. (View Full Content)
Negotiate SaaS Agreements That Are Built to Last
Vendor Management Blueprint
Review your SaaS contracts to leverage your unique position during negotiations and find substantial cost savings. (View Full Content)
Types of Content
All Results 23
Solution Set 19
Video 2
Concierge Services 1
Industry 1
Cancel
Unable to find what you're looking for?
Previous
Next

NOTE:

To book Custom Vendor Landscapes, please reach out to srsupport@infotech.com

Industry Research

Selling

Positioning

The Industry Product offering consists of a set of industry-specific content, tools, and expert engagements to accelerate your path to innovation

Deep industry expertise	Develop a deep two-way advisory relationship. Work with our experts to understand business expectations and define the problem and opportunities. Schedule ongoing services (unlimited and timely analyst calls, workshop, guided implementation) to maximize the use of our research and tools.
Industry-based, actionable content	Access industry-specific trends, top technologies, benchmarking reports, reference architectures, and best practices. Review how industry trends effect business capabilities and build plans to mitigate risk and capitalize on opportunities. Leverage pre-built reference architectures to enhance your view of the business and drive business value.
Peer-to-peer engagement	Engage with industry peers during Info-Tech's LIVE Conference, one-on-one meetings, and industry roundtables.

Industry Research

Selling

Triggers Words and Phrases

- Niche software
- Unique needs
- Digital strategy
- Need for deeper research
- Want to know what their peers are doing
- Want peer comparisons/competitive landscape

Problem Questions

- Do you find it challenging to benchmark your IT department against peers?
- Have you experienced challenges keeping on top of industry trends while managing the day to day?
- Are you lacking peer connections in your industry?

Solution Questions

- Would it be beneficial to have benchmarking data to make a business case for increased budget or headcount?
- Are you looking to use technology to maintain a competitive edge in the market?
- Have you considered connecting with peers through roundtables or peer working groups?

Industry Research

Engaging

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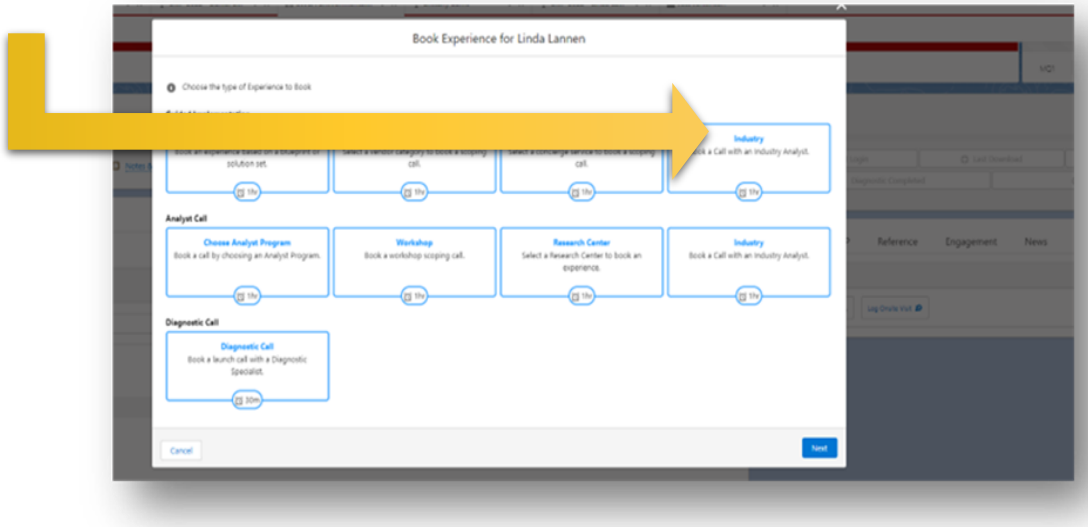
— SALES ENABLEMENT —

How to Book

- Video: Booking an Industry Guided Implementation
- Determine if they have industry access with ITRG
- Navigate to the SFDC contact and select the 'Book Experience' Button
- Under 'Guided Implementation' select 'Industry'
- Search for the industry blueprint and select.
- Select a date/time
- Select the analyst
- Document notes in the 'Description' field.
- For calls not related to a publication: Book an Industry Analyst Call

- Video: Book an Industry Analyst Call



Questions?

Reach out to - IndustryAdvisory@technologynews.net

Contract Review

Selling

Trigger Words and Phrases

- Upcoming vendor purchase
- Difficult renewal
- Upcoming renewal
- Need for cost-reduction of IT spend
- No prior negotiating experience.
- Vendor sprawl

Problem Questions

- Are you concerned about lack of experience when it comes to managing contracts?
- Do you find that contract negotiation takes a long time?
- Are you concerned that your team may miss something in the contract terms that could be disadvantageous to your department?
- Are you concerned that your legal team may lack IT knowledge to pick up on disadvantageous T&Cs?

Solution Questions

- Would it save time/stress to have someone review your largest contracts?
- Would you find it helpful to optimize Terms and Conditions?
- Would you be interested in learning about how we could help you optimize your contract terms and pricing in such a way where all savings goes back into your pocket?

Contract Review

Selling

Positioning

The Vendor Contract Review service provides detailed change recommendations and vendor negotiation support.

Contract Review With No Limitations	Get an in-depth contract terms and conditions review from our experts within five days. Identify and fill the gaps between silos of legal, IT, and business stakeholder reviews. Leverage our unlimited contract review service with no limitation on the number of contracts or length.
Risk Mapping and Recommendation	Get written feedback for each contract before your call with our analyst. Receive detailed comments in line with the contract.
Negotiation Support	Benefit from coaching and support throughout the contract terms negotiation. All identified savings go back to the member organizations' bottom line; we don't take a % cut.

Contract Review

Engaging

How to Book

Complete Document Set - Ensure the complete document set is sent in by the client for review.

- If there is an SOW, for example, it needs a Master Agreement attached as well.
- URL/Hyperlinks MUST be printed and sent over by the client – ITRG cannot pull these documents (liability issue)

Time is of the Essence – It is critical to strive to book the client call as soon as possible once an analyst and time block has been provided to Sales. Analyst availability is consumed on a first come, first served basis and delays can result in analyst capability being scheduled for another call.

Calendar Holds – Do not send a calendar hold/block for a CR case; it will be rejected. We make best efforts at managing analyst availability; however, the process is manual, and we cannot guarantee date/time slots if cases are not booked in a timely manner (24 hours).

Contract Review

Engaging

VCCO Coverage of Executed Agreements/Contracts

VCCO does NOT provide a T&C review on executed (signed) contracts…Why Not?

- Vendors are reticent to renegotiate existing agreements unless the customer is adding material spend or has leverage
- If the vendor is willing to renegotiate, the result will be a new contract or addendum to existing contract

What are our options to manage client expectations for executed contracts?

- Bring the new proposed contract for review (new paper)
- Bring the Addendum to the existing contract for review (targeted review of Addendum changes)
- Client provides a list of problematic sections to the existing contract with explanation of the issue(s), set up Advisory call to discuss problem areas with analyst (targeted review of identified sections)

Contract Review

Engaging

Questions?

When you have questions for the team:

We are asking you to direct your emails to the team in the following manner.

- Contract Reviews for clients. Send internal email to Vendor Practice VendorPractice@technologynews.net
- Vendor Management calls for clients. Send internal email to VendorPractice@technologynews.net
- Price Benchmarking & Negotiations calls for clients. Send internal email to Price Benchmarking & Negotiation PriceBenchmarkingNegotiation@technologynews.net
- Price Benchmarking & Negotiations + Contract Review for major vendors. Send internal email to Price Benchmarking & Negotiation PriceBenchmarkingNegotiation@technologynews.net

Note: Please don't send emails directly to analysts in the VCCO + VM practice and only use distribution lists above. We don't want to miss you email and this won't happen when using distribution lists above.

Finally, we won't respond to emails directly from your clients as you need to set up a case for every client interaction.

Price Benchmarking and Negotiation

Selling

Positioning

The Vendor Pricing Benchmarking and Negotiation service assesses the pricing offered, provides recommendations, and assists with ongoing negotiation assistance.

Vendor Insight Call	Understand pricing benchmarks to support your negotiation. Discuss new negotiation strategies with our experts. Get a quick response from our experts – proposal reviews within 48 hours before the call.
Ongoing Negotiation Assistance	Get feedback on all vendor interactions and guidance on how to respond to them. All savings go back to the member's organization. Info-Tech does not take a % cut.
High-Value Contracts, Top Vendors	Service is available for all contracts over $1M for hardware and software. Available for over 45 IT major vendors including Microsoft, ServiceNow, Salesforce, Workday, Oracle, and SAP.

Price Benchmarking and Negotiation

Selling

Trigger Words and Phrases

- Upcoming vendor purchase
- Difficult renewal
- Upcoming renewal
- Need for cost-reduction of IT spend
- No prior negotiating experience.
- Vendor sprawl

Problem Questions

- Are you concerned about lack of experience when it comes to managing contracts?
- Do you find that contract negotiation takes a long time?
- Are you concerned about your teams ability to negotiate effectively?
- Have you ever been burned in a contract negotiation?
- Are you struggling with application and vendor sprawl?

Solution Questions

- Would it save time/stress to have someone review your largest contracts?
- Would you find it helpful to reduce costs on contracts?
- Would it be valuable to have someone with extensive negotiation experience be in your corner on the next biggest deal?
- Would it be valuable to have someone who reviews multiple of these agreements a year review yours for optimization opportunities?
- Are you looking to make sure your deal is competitive with your like-size industry peers?

Price Benchmarking and Negotiation

Engaging

How to Book

- Check if they are entitled to this service.
- Send documentation to VendorPractice@technologynews.net for contract review, PriceBenchmarkingNegotiation@technologynews.net for price benchmarking.
- *Once an analyst is assigned, attach documentation to the case created.*
- Give the analyst enough prep time – *they need to review ahead.*

Questions?

When you have questions for the team:

We are asking you to direct your emails to the team in the following manner.

- Contract Reviews for clients. Send internal email to Vendor Practice VendorPractice@technologynews.net
- Vendor Management calls for clients. Send internal email to VendorPractice@technologynews.net
- Price Benchmarking & Negotiations calls for clients. Send internal email to Price Benchmarking & Negotiation PriceBenchmarkingNegotiation@technologynews.net
- Price Benchmarking & Negotiations + Contract Review for major vendors. Send internal email to Price Benchmarking & Negotiation PriceBenchmarkingNegotiation@technologynews.net

Note: Please don't send emails directly to analysts in the VCCO + VM practice and only use distribution lists above. We don't want to miss you email and this won't happen when using distribution lists above.

Finally, we won't respond to emails directly from your clients as you need to set up a case for every client interaction.

RASF

Selling

Positioning

Info-Tech Software Selection services are comprised of multiple tools and structured programs to help you select your best-fit software.

Expert Guidance Through Your Selection Process	Ensure the right plan, business case, and internal alignment when selecting software by leveraging software trends, strategy blueprints, and selection guides.
Softwarereviews Content	Compare feedback on features, capabilities, and vendor relationships based on feedback from real users using our online platform.
Rapid Application Selection Framework	Improve the efficiency of your software selection with a framework that includes unbiased vendor evaluation tools and contract review.

RASF

Selling

Trigger Words and Phrases

- Small vendor selection
- Lack of knowledge in a software space
- Lack of alignment between stakeholders on best software.
- No formal methodology for application selection.
- Software selection takes a long time
- Selected software doesn't match business requirements by the time it's implemented
- Too many options in market
- No sound process to select software

Problem Questions

- Is having a consistent, repeatable approach to software selection something your team currently struggles with?
- Do you find that software selections are extremely time consuming?
- Do you find that it's challenging to select the right software due to a lack of efficient process?
- Have you experienced challenges with software not meeting requirements because of how long it took to select or because of an inadequate needs analysis?

Solution Questions

- Would it be helpful to embed a process for software selection that is faster, yields higher satisfaction, and ensures you get you the best price possible?
- Would it be helpful to align on a software solution?
- Would it be valuable to have a proven process to follow to select software in 5 weeks?
- Would it be useful to partner with an SME over the course of your software selection and have them teach you & your team a best practice methodology for selecting software?
- Have you considered leveraging external support to navigate the process and market?

RASF

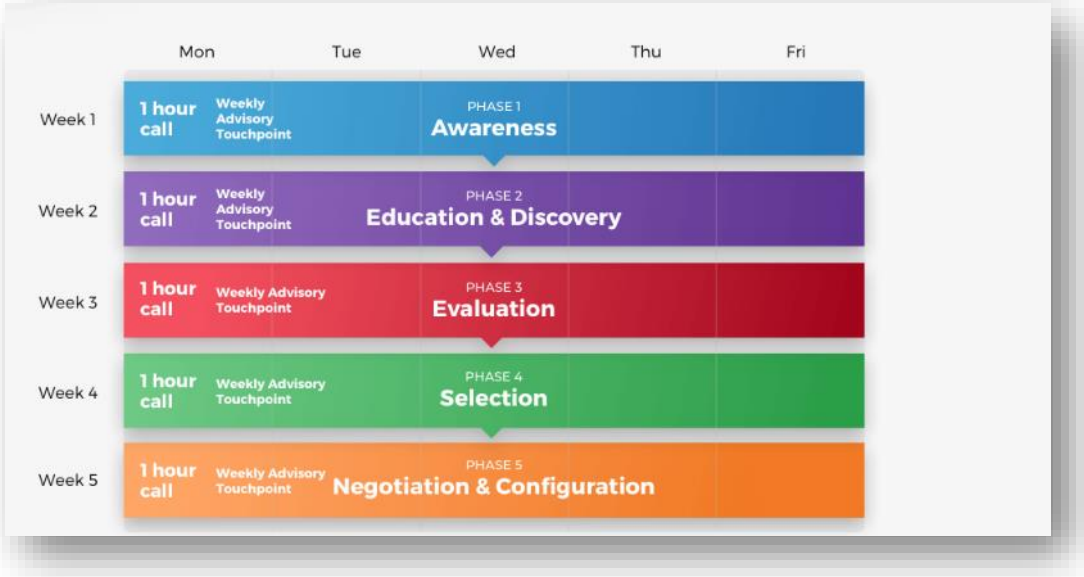
Engaging

How to Book

3 Delivery Models:

- Do-it-yourself
- Software Selection Engagement (like a GI)
- RASF Workshop

- Determine if the member is entitled
- Book as a 'Guided Implementation' under 'The Rapid Application Framework' blueprint.
- Book a scoping call to determine the delivery method.
- Reminder – Commodity (e.g. Cloud Storage Drives) or Mid-Tier (e.g. Marketing Automation) Applications. Large Enterprise Applications (e.g. ERP) are best suited for a traditional approach to selection.



Software Reviews

Selling

Positioning

SoftwareReviews is an online platform that compiles hundreds of data points on enterprise software performance to help compare and select software.

Data-Driven Reports	Understand the solutions available in the market. Compare features and capabilities with our Market Data Quadrant Report and detail product scorecards.
Vendor Relationship, Emotional Footprint	Measure the value of the vendor relationship. Compare multiple vendor relationship data points around strategy & innovation, service experience, contract & negotiation, product experience, and conflict resolution.
Online, Easy-to-use Tools	Get head-to-head vendor comparisons and alternative recommendations. Access detailed customer reviews.

Software Reviews

Selling

Trigger Words and Phrases

- Software selection
- Shortlisting
- Need to understand products and features
- Need to convince stakeholders
- Need a quick summary
- Too many options in the market
- Concern about vendor bias
- Too much time to find the right software

Problem Questions

- Do you find it challenging to create a shortlist of vendors?
- Are you concerned about the current tools you must conduct research on software vendors
- Are you planning on procuring software soon? How do you currently go about deciding which vendors to consider?
- Are you concerned about vendor bias in the research you're conducting?
- Do you find it overwhelming how saturated the market is?
- Do you find it challenging to get information around user experience with vendors?

Solution Questions

- Would it be helpful to have compiled reports of the top vendors?
- Would it be helpful to clearly understand capabilities of each?
- Would it be helpful to understand quality of vendor relationships?
- Would it be valuable to have data from real end users to make your decision?
- Have you considered a vendor agnostic party to help navigate the market?
- Would it be valuable to be able to rank vendors based on your requirements?
- Would unbiased reports be helpful?

Software Reviews

Engaging

How to Book

Not bookable through Direct Booking

- For an in-depth review of a category report via analyst call OR custom vendor landscape
  - Send an Email to srsupport@infotech.com

- Otherwise, you can simply send member reports as needed.

Counselor (Counselor, Executive, CIO)

Selling

Positioning

INFO-TECH RESEARCH GROUP — SALES ENABLEMENT —

Custom Key Initiative Plan	Build a fully customized plan of your top five initiatives. Map those initiatives to all relevant Info-Tech content and experiences to assist with execution and to ensure success.
One-on-One Executive Sessions	Tailor onsite and remote engagements to your goals, needs, and priorities. Run confidential one-on-one sessions with your executive counselor where you can work through your agenda. Benefit from leadership, coaching, and decision support across various topics, including business stakeholder engagement, budget planning exercises, and 360 performance feedback.
Personal Effectiveness Planning	Enhance your strategic leadership, business acumen, and value. Establish stronger relationships and influence with stakeholders and across the C-suite. Leverage Info-Tech's 90-Day "Follow-Me" Service.

Counselor (Counselor, Executive, CIO)

Selling

Trigger Words and Phrases

- Looking for executive support
- Need networking
- Leadership Development
- Geared towards executives
- Branding
- Executive communications
- New to role
- New to industry
- Industry or VCCO triggers mentioned
- Stakeholder management

Problem Questions

- How are you coping with leadership decisions?
- Do you find it challenging to manage business expectations?
- Are you experiencing challenges with stakeholder buy-in?
- Are you concerned about making a positive impression on your stakeholders being new to the role?
- Are you concerned about the pace of change in your industry and your ability to keep up with trends?

Solution Questions

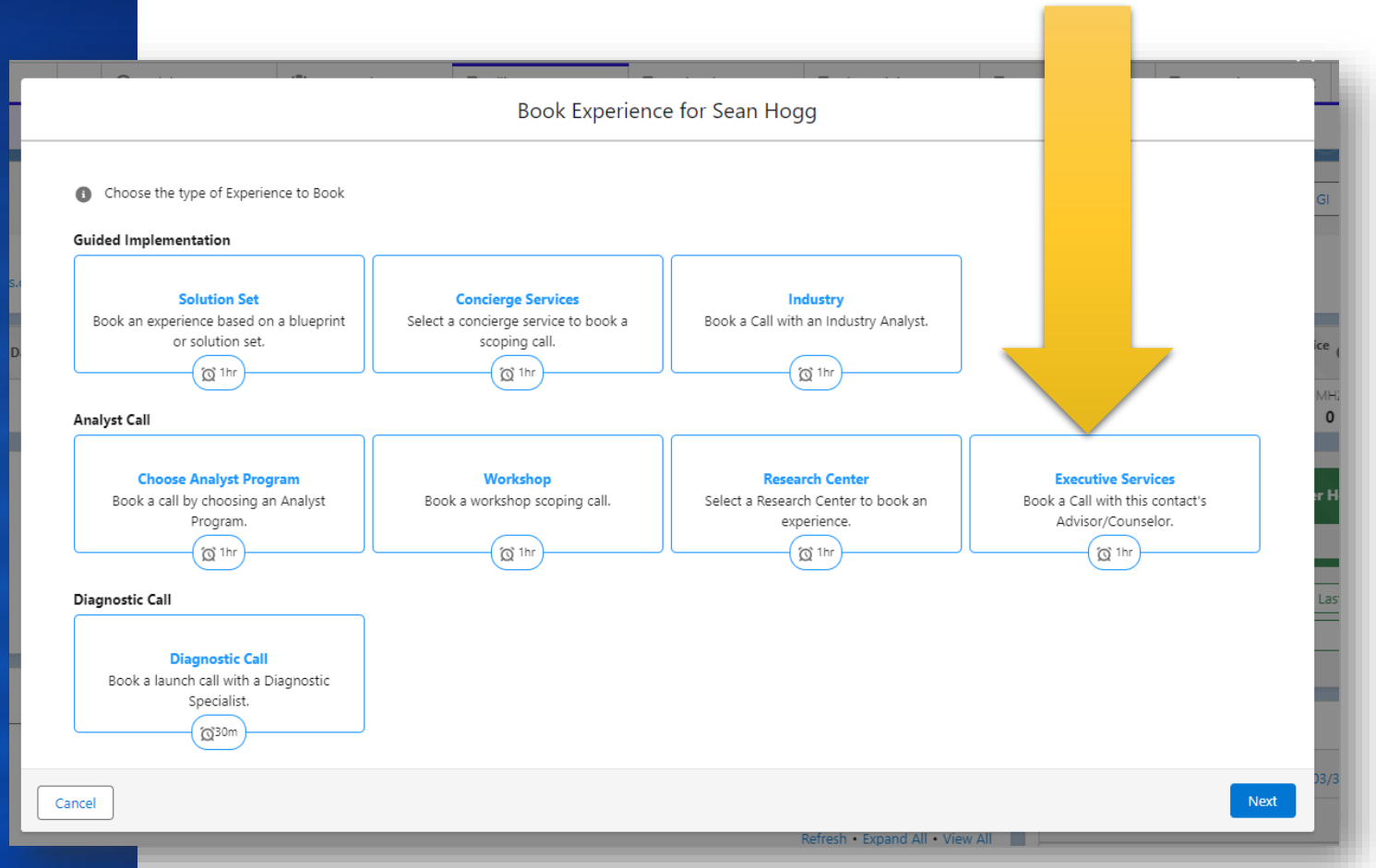
- Would it be helpful to be partnered with a seasoned IT leader to help with your strategic decision making & career advancement?
- Would it be helpful to have someone provide feedback prior to board meetings/executive meetings?
- Would it be helpful to have someone in your corner giving advice on tough decisions?
- Have you considered a coach to support navigation of stakeholders and best way to tackle objectives?
- Would you find it valuable to have someone with whom you could have confidential conversations around strategic objectives & projects as well as your own aspirations?

Counselor (Counselor, Executive, CIO)

Engaging

How to Book

- Find the ‘Book Experiences’ button on the service side-kick.
- From there, select ‘Executive Services’
- Proceed through the steps.
- For more information, watch this video: Booking an Executive Services Call



Technical Counselor

Selling

Positioning

- Technical Counselor memberships are a service offering targeting senior technical leaders in organization where the clients is interested in having an expert that can provide deeper technical expertise and support for a specific technology domain.
- Single consistent dedicated counselor to work with the client across all experiences in that technical domain.
- Technical Counselor calls giver advice tailored to the culture and situation of the member with specific advice backed by many years of practical experience.
- Technical Key Initiative Plan built by the counselor and delivered by a combination of hand-picked analysts on a subject matter expertly crafted by a technical counselor who has firsthand experience delivering this in that domain over many years.
- Technical Coaching is provided by the technical counselor that can go very deep in conversations relating to the domain. These conversions may not have been possible with others in the member organization due to the absence of other technical leadership to have these thought-provoking conversations with.

Technical Counselor

Selling

Trigger Words and Phrases

- New to role/domain
- Promoted to lead a domain
- Highly visible initiative
- Need to develop an actionable plan to build the practice and platform
- Practical Counseling
- Requirement to build a new practice or domain (Data Platform for example)
- Already late delivering a new platform

Problem Questions

- Are you concerned that lack of experience with domain X may be increasing potential risk?
- Are you concerned about any lack of experience or skills taking on this new role or challenge?
- Are you concerned about the technical nature of the new challenge or its far reaching nuances?
- Are you struggling to level up the skillset in a domain?

Solution Questions

- Would it be helpful to partner with someone with extensive knowledge in this domain who has previously executed project of this nature on time to coach and counsel you through the project?
- Would you feel more confident executing if you had external support from a seasoned technical professional backed by tried and trusted research to get things moving quicky?

Technical Counselor

Engaging

How to Book and Engage

- Notify Andy Neill or John Annand to request a POC.
  - Ensure you have VP approval.
- Review slide 14 of the playbook for Proof-of-Concept process.
  - INTERNAL - TECHNICAL COUNSELOR PLAYBOOK.pptx
- Technical Counselors engage only at the contact level – not the entire account.
- They will build a Technical Key Initiative Plan to support your member
- Communicates with account level Counselor (or Advisor) on service plans and renewals for the technical counselor membership

IT Staffing and Spend Benchmarking

Selling

INFO-TECH RESEARCH GROUP — SALES ENABLEMENT —

Positioning

The IT Spend and Staffing Benchmarking service aligns your spending data with Info-Tech's IT Financial Management (ITFM) benchmarking thought model and provides recommendations on spend optimization.

A framework and approach to provide transparency	Map how your IT spend is allocated across four stakeholder views, aligned to their priorities: expense, service, business, and innovation. Visualize which initiatives your IT human resources support with a complete staff map.
Reporting and Recommendations	Review your resource allocation and optimization options with ongoing discussions with Info-Tech experts. Optimize spending and staffing with clear recommendations and next steps.
Benchmarking with industry peers	Compare your spending and staffing to others in your industry with a benchmarking report. Access to Info-Tech experts to discuss your results.

IT Staffing and Spend Benchmarking

Selling

INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

Trigger Words

- Cost optimization
- Cost reduction
- Recession proofing
- Budgeting
- Need peer benchmarking
- Need to show transparency of spend

Problem Questions

- Are you concerned that a lack of expertise may cause IT spend to be higher than necessary?
- Do you struggle with having a process for mapping IT spend and staffing information?
- Is it challenging to find information on IT spend and staffing levels in your industry?
- Are you struggling to find support in justifying costs?

Solution Questions

- Would you be interested in partnering with a seasoned expert from IT and Financial Management backgrounds?
- Would you like to have a repeatable framework for understanding spend/staffing levels?
- Would it be helpful to understand how you measure against peers?
- Would it be helpful to present a more transparent summary to your CFO/Board of Directors?

IT Staffing and Spend Benchmarking

Engaging

Selling and Engagement Support

To make the process of intake and delivery seamless, follow this process:

1. Please send an email to itssbenchmarkingrequests@infotech.com to be assigned an ITSS Research Analyst and a date/time for the call.

2. Once you have an ITSS analyst, follow these steps in SFDC to book as a Sales Support Call - https://infotechrg.sharepoint.com/sites/TheSalesHub/2%20Execute%20Retention%20Lifecycle/Engaging%20Members/Direct%20Booking%20Project%20-%20Training%20Doc.%20-%20IT%20Spend%20%26%20Staff%20Benchmarking%20(ITSS)%20Scoping%20Call.pptx?web=1

CIO Playbook

Selling

Positioning

The CIO Playbook is a road-tested systematic improvement program designed to unleash IT potential so organizations can succeed.

1. Step-by-Step Program:
   - The CIO Playbook offers a structured, step-by-step program to improve IT performance systematically. It combines best-practice research and advisory services to ease the member's journey.

2. Target Audience:
   - The CIO Playbook is primarily designed for the senior-most IT leader, typically the CIO. However, it also involves direct reports of the CIO, such as the CDO, CTO, CISO, Chief Program Officer, and other senior IT leaders.

3. Critical Outcomes:
   - The program delivers critical outcomes for members, including a coherent journey for the CIO to meet their performance targets, regular pulse checks and measurement of key progress metrics, and a proactive approach to leveraging Info-Tech insights across every aspect of IT.

4. Key Differentiators:
   Unlike point solutions that serve as stopgaps or quick fixes, the CIO Playbook is scalable and adaptable. It is designed for clients to see progress year-over-year.

CIO Playbook

Selling

Discovery Questions

Corporate Objective:

- What are the key performance indicators (KPIs) your company is focusing on this year?
- How do you measure the success of your IT initiatives in relation to these KPIs?

Business Issue/Goal:

- What specific challenges are you facing in aligning IT with your overall business strategy?
- How do you currently measure the impact of IT on your business goals?

IT Projects:

- Can you describe the most critical IT projects you are currently working on?
- What are the expected outcomes of these projects, and how do they align with your business objectives?

Problems:

- What are the main obstacles you encounter in managing your IT projects effectively?
- How do these obstacles affect your ability to deliver value to your stakeholders?

CIO Playbook

INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

How can clients access “The CIO Playbook Program”?

- The CIO Playbook will be available to all members for download as research.
- Leadership Summit and/or the Annual IT Department Assessment are pre-requisites for enrolling in the CIO
- Playbook Program Journey. These initial experiences may be added to the membership as an add-on or
- provided via a Core Membership.

When can this engagement be delivered?

- This is an account-level service, we can start and deliver these engagements at the client’s request, per their and the Counselor’s schedule.

What is required from the member to complete this engagement?

- We require the Readiness Assessment to be completed and the relevant CKIP’s created and managed.
- We require the monthly reviews between the Counselor and member to be completed.
- We require a limited number of staff to provide feedback and input during validation discussions.

IT Playbook

Like the CIO Playbook, IT Playbooks offer a structured, 12-step program designed to help IT leaders systematically improve domains of Applications, Data, I&O, and Security.

These programs are built around a calendar-based framework with 12 monthly focus areas.

They're designed for application leaders who want to move from reactive firefighting to strategic excellence

Entitled Members

- All Members have access to the web content and can execute the playbooks on their own
- For guided support, the member must have a technical counselor license.
- Once the above is clear, book a 30-minute introductory call between the member and Yatish Sewgoolam or the respective Technical Counselor.

Project Success Assurance

Selling

Positioning

The CIO Playbook is a road-tested systematic improvement program designed to unleash IT potential so organizations can succeed.

1. Step-by-Step Program:
   - The CIO Playbook offers a structured, step-by-step program to improve IT performance systematically. It combines best-practice research and advisory services to ease the member's journey.

2. Target Audience:
   - The CIO Playbook is primarily designed for the senior-most IT leader, typically the CIO. However, it also involves direct reports of the CIO, such as the CDO, CTO, CISO, Chief Program Officer, and other senior IT leaders.

3. Critical Outcomes:
   - The program delivers critical outcomes for members, including a coherent journey for the CIO to meet their performance targets, regular pulse checks and measurement of key progress metrics, and a proactive approach to leveraging Info-Tech insights across every aspect of IT.

4. Key Differentiators:
   Unlike point solutions that serve as stopgaps or quick fixes, the CIO Playbook is scalable and adaptable. It is designed for clients to see progress year-over-year.

Project Success Assurance

Selling

Discovery Questions

- What are the critical projects or initiatives that your organization is currently undertaking?
- How do you currently manage project oversight and ensure project success?
- What challenges do you face in maintaining project documentation and stakeholder confidence?
- How would having a dedicated project advisory team improve your project outcomes?
- In what ways could improved project documentation and oversight reduce risks and save time and money for your organization?
- How important is it for your organization to have a proactive approach to managing project risks?
- How do you currently ensure that your projects are aligned with industry best practices and standards?
- What benefits do you see in having a collaborative project review with industry SMEs and project management advisors?
- How would a 16-point best practice inspection framework enhance your project management processes compared to your current methods?

Project Success Assurance

INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

How can clients access Project Success Assurance?

- Included with FY25 version of the CIO Counselor Membership.
- Available for purchase as a membership or standalone add-on.

Three Steps to Start:

- Critical Project Identification: A critical member project or key initiative is identified that may benefit from Project Success Assurance support.
- Review Client Fit with Project Success Assurance: Advisor review of client and project support needs.
- Establish Commitment: Signed copy of Project Success Assurance Engagement Document required to proceed.

Delivery Constraints:

- Service should ideally be used on projects with timelines that align with membership contract or do not exceed current contract term by greater than 6 months
- If client's project is identified as better suited for IV&V Consulting Services, we will recommend them to our Program Assurance Consulting Services.

Project Success Assurance

Are there other comparable solutions on the market?

1. Project Audits:

a) A Project Audit inspects if the project is being managed properly according to internal or external standards and guidelines.

2. Independent Validation & Verification:

a) Hands-on consulting services offering ongoing assurance for enterprise-size efforts. Competitors range from Deloitte, KPMG, Accenture, and others. Info-Tech also offers IV&V services wherein our experts will engage various stakeholders to provide robust and ongoing assurance on a large project or program.

Why choose Info-Tech's Project Success Assurance for this product over the other options?

- You want a high-level reportable view of a medium-to-large project.
- When the standard status reporting is not sufficient for executive leadership.
- When an advisory partnership will help provide assurance and guidance to a project manager.

When to leverage IV&V Consulting instead?

- When the implementation is high-risk, or the project is already at risk.
- When IV&V services are mandated for compliance reasons.
- When the project/program cost exceeds $5,000,000.
- When a wide variety of project stakeholders (e.g. executive, management, technical) need to be engaged.

Info-Tech offers various levels of support to best suit your needs

DIY Toolkit
"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."
Guided Implementation
"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."
Training & Development
"Our team needs to develop the practical skills to succeed as an IT professional in today's climate of accelerated business and technological transformation."
Workshop
"We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."
Consulting
"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

Consistent research methodology and frameworks are used throughout.

Develop the practical IT skills to succeed as an organizational leader in today's climate of accelerated change

1. Mature core IT processes to build organizational resiliency

Info-Tech Academy

IT Management Accelerators

2. Build the technical skills needed to manage risk and sustain innovation

AI Workforce Development Certificate Program

Cybersecurity Workforce Development Certificate Program

3. Lead and manage your teams at the pace of change

Adaptive IT Leadership Development Certificate Program

IT Leadership Masterclasses

Management Fundamentals

Women Leading IT

Training & Development Products

Public Programs Catalog Overview

Product	What is it?	Membership Level	Duration
Info-Tech Academy	A series of on-demand, self-driven eLearning courses to help your team master core IT Management & Governance processes.	Reference+	2-3 hrs
IT Leadership Masterclasses	Facilitated, public online learning events designed for people leaders of all levels.	Team+	90 min
IT Management Accelerators	Public, role-specific online programs focused on systematically improving your IT department.	Team+	5 days
Women Leading IT	A training program designed to cultivate the connections, confidence, and leadership skills essential for success.	Standalone/Add-on	12 weeks
Management Fundamentals	A training program that develops foundational management skills to support people development, and leadership growth.	Standalone/Add-on	12 weeks
AI Workforce Development	A training program that equips your IT teams with essential skills to drive successful adoption of enterprise AI.	Standalone/Add-on	12 weeks
Cybersecurity Workforce Development	A training program that builds critical cybersecurity skills and capabilities within your IT infrastructure and operations teams.	Standalone/Add-on	26 weeks
Adaptive IT Leadership Development	A training program that bridges technology and human-centric principles to drive adaptability at all levels of leadership.	Enterprise Team – Annual Training & Development Membership	26 weeks

Included in most memberships.

Training & Development Products

Membership Add-Ons

INFO-TECH RESEARCH GROUP — SALES ENABLEMENT —

Annual Training & Development Add-On's

Small Team	Standard Team	Enterprise Team
Register your team for any **ONE** of these programs each year, choose from the following: AI Workforce Development: Up to 3 Practitioners; OR 1 Leader + 1 Practitioner Cybersecurity Workforce Development Up to 2 Analysts Management Fundamentals: Up to 6 Participants Women Leading IT: Up to 6 Participants IT Leadership Masterclasses: 1 Private Cohort for up to 30 participants; custom topic selection for up to 3 sessions	Register your team for any **ONE** of these programs each year, choose from the following: AI Workforce Development 1 Leader + 3 Practitioners Cybersecurity Workforce Development 1 Leader + 1 Analyst OR up to 3 Analysts Management Fundamentals Up to 10 Participants Women Leading IT Up to 10 Participants IT Leadership Masterclasses 1 Private Cohort for up to 30 participants; custom topic selection for up to 6 sessions	Register your team for any **ONE** of these programs each year, choose from the following: AI Workforce Development 2 Leaders + 4 Practitioners; OR Course Audit for up to 20 observer participants Cybersecurity Workforce Development 1 Leader + 3 Analysts Management Fundamentals 1 Private Cohort for up to 30 Participants Women Leading IT 1 Private Cohort for up to 30 Participants IT Leadership Masterclasses 1 Private Cohort for up to 30 participants; custom topic selection for up to 10 sessions Adaptive IT Leadership Development Program 1 Private Cohort for up to 20 participants

Academy

Empower your team with outcome-driven learning.

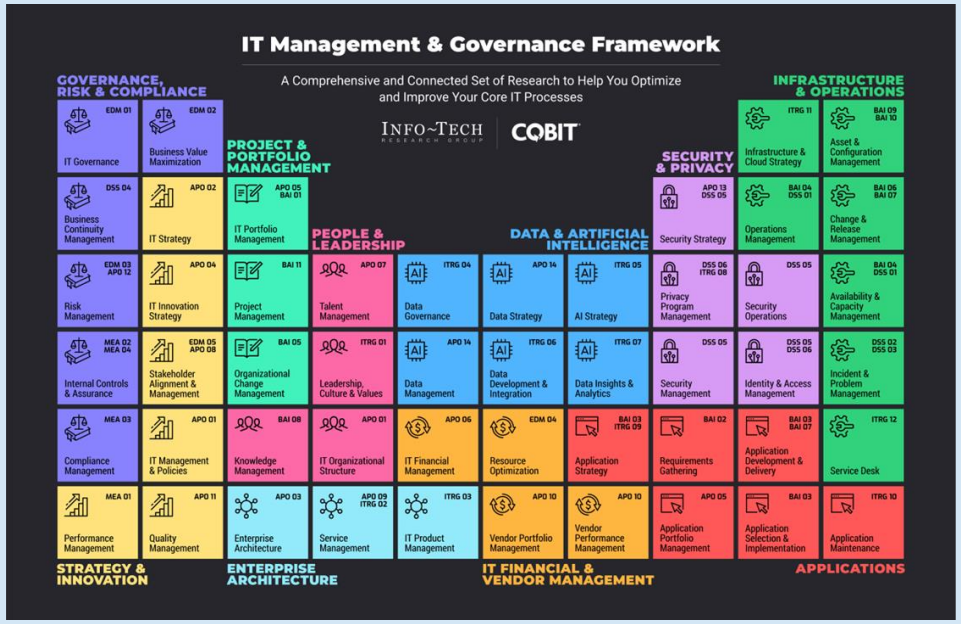
Our Academy courses are designed to help teams quickly build confidence and capability in core IT and business topics. Each course is structured around clear learning outcomes and real-world application—so your team doesn't just learn, they level up.

60-90 minutes self paced courses

Included In all memberships. Members can assign to non-members

10 different Certificate Programs & PDU Credit Eligible

Aligned to the IT Management & Governance Framework



Academy

Program Overview

Academy is a built-in Learning Content Management System designed to help Members **train** their staff and **develop** a world class IT Team.

50 courses and 10 certificates offered.

New Courses Recently Published in 2025:

Asset Management
Configuration Management
Cost & Budget Management
Cost Optimization
IT Strategy
Security Management
Availability & Capacity Management
IT Organizational Design

Academy

FAQ

Who can enroll in these courses?
Available for all Info-Tech Members. Members can assign courses to non-members as well!

When are the new courses published?
New courses are produced in parallel with the corresponding Blueprint updates

Where can I find more details and sales collateral?
Sales Hub Link HERE. Communicating with your clients and prospects is easy! Use these templates - Academy_Sales_Email_Scripts

Who can I talk with about this product?
Ryan Parsons

Academy Webpage Link HERE

Academy Feedback

Average Feedback Score **9.0/10**

Recent Academy Learner Feedback

“Very informative. The structure and the visuals were great. Loved the conversational nature of the course. It didn't feel like a boring lecture.” - Requirements Gathering Course

“Course Was Easy To Follow In Manageable Modules Exercises Were Very Useful.” Info-Tech Academy - Cost Optimization Course

“Great course. Straight to the point. This will greatly help for next budget.” - Cost & Budget Management Course

“This was very informative and quick to complete. It gave me a better understanding of APM and how I can present a use for implementing a roadmap.” – Application Portfolio Management Course

IT Leadership Masterclasses

A robust collection of 90-minute interactive online sessions focused on core skills for all levels of IT leaders.

These micro-byte learning sessions bring together leaders from multiple organizations for facilitator-led, peer enhanced learning experiences. Chart your personal journey based on your individual goals.

- 90 minutes each, rotating schedule designed to maximize time
- Included In membership & Private Programs Available
- Connection with peers across IT and build your network
- Blend of small and large discussions to share experience
- Certificate & PDU Credit Eligible

Key Topics Covered:

1 Personal Development – Lead Self

- Emotional Intelligence
- Build and manage your leadership brand
- Board Readiness

2 Leadership:

- Lead people
- Build Teams
- Create Connections

3 Business Confidence:

- Business Acumen
- Change Leadership
- Strategic Execution

IT Leadership Masterclasses

Product Overview

90 Minute IT Leadership Masterclasses are research-based learning programs curated from the latest trends enabling IT to drive the future of work to go beyond the ‘what’ with actionable tools and templates.
Facilitated by experienced leadership subject matter experts that provide insight and guidance to drive behavior change

New events and dates below. Registration is OPEN. Available for **Team Seat and above**.

These events are highly collaborative and led by our world class facilitators. These events are **NOT recorded**.

Available to Info-Tech Members **Team Seat and above**. Entitlements enable members to attend ALL Masterclass events. Non-Transferable.

IT Leadership Masterclasses

FAQ

Who can attend these sessions? Available for Info-Tech Members with TEAM seat or above. Eligible members can attend as many or as few Masterclasses as they would like. Non-Transferable

***How to register?* -** Registration for 90 Minute Masterclasses here. When completing registration use ITRGMEMBER to zero out any fees for members with an entitlement (TEAM seat or above)

***When are the events?* -** Full schedule of Masterclass events here

***Where can I find more details and sales collateral?* -** Masterclass Details and Learning Objectives HERE

Communicating with your clients and prospects is easy! Use these templates - Masterclass_Sales_Email_Script

Who can I talk with about this product? - Ryan Parsons

90 Minute Masterclass Webpage Link HERE

IT Leadership Masterclasses

Feedback

Average Feedback Score - **4.5/5**

Recent Leadership Masterclass Feedback

“The interaction with other people in the session to get their perspective on the subject was most valuable.”

"Using the "Team Effectiveness Answers" survey to drive conversation brought the most value to me "

"Smaller group gave plenty of time. Combination of breakouts and full-group participation were of value to me”

“The method was most valuable for me. The stage was set; examples were given and then extracting real examples with small groups was great. Coming back to dialogue with more information in the larger group and returning to brainstorm solutions in small groups was very effective for me. I ended up with some very good takeaways.”

IT Management Accelerators

- 5 days of facilitated discussions & activities
- Choose from 7 program options depending on your role AI, Applications, CIO, Project Management, Data, Infrastructure or Security
- Included In most memberships
- Blend of small and large discussions to share experience
- Certificate & PDU Credit Eligible

Participants in each Accelerator event will identify, discuss, and understand the key metrics, process improvement methodologies and ownership, business value sources, and stakeholder management frameworks required to run a top-notch IT shop.

This comprehensive 5-day training program offers immediate value by unlocking the power of collaborative learning from both industry experts and peers across various sectors. Each day, our subject matter experts will guide you through a different topic, sharing key insights to help you approach each initiative with confidence and knowledge. By the end of the week, you will have completed an opportunity and challenge self-assessment and roadmap specific to your organization.

Program Highlights

Immersive, Role-specific Training

Covers 7 key IT disciplines to help you systematically improve your IT department:

- CIO
- Applications
- Data
- Infrastructure
- Security
- Project Management
- AI

Collaborate & Learn From Your Peers

Leverage shared experiences and insights gleaned from class participants.

Connect With Industry Experts

Access our world-class research analysts, as well as industry experts.

Develop Your Network

Networking via small group breakouts expand your learning.

Walk Away With a Plan to Execute on

Build a plan that allows you and your team to successfully execute on core process improvements and strategic direction.

IT Leadership Accelerators

Program Overview

Accelerators (formerly Playbooks) are 5 day, role-specific, peer blended training programs to help you systematically improve your IT department. Online, facilitator-led.

This comprehensive 5-day training program offers immediate value by unlocking the power of collaborative learning from both industry experts and peers across various sectors. Each day, our subject matter experts will guide you through a different topic, sharing key insights to help you approach each initiative with confidence and knowledge. By the end of the week, you will have completed an opportunity and challenge self-assessment specific to your organization.

IT Leadership Accelerators

FAQ

Who can attend? **-** Available for members TEAM seat and above. Eligible members can attend ONLY 1 Accelerator event per year.

How to register? **-** Registration for 5 Day Accelerators events HERE. When completing registration use ITRGMEMBER to zero out any fees for members with an entitlement

When are the events? - Full schedule of Accelerators events HERE

Where can I find more details and sales collateral? - Sales Hub Link HERE. Communicating with your clients and prospects is easy! Use these templates - Accelerator_Sales_Email_Scripts

Who can I talk with about this product? - Ryan Parsons

Accelerator Webpage Link HERE

IT Leadership Accelerators

Feedback

Average Feedback Score **9/10**

Recent Playbook/Accelerator Feedback

"The highlights of the **CIO Accelerator** were networking with my peers and feeling a sense that we all experience the same challenges."

"There were a lot of good takeaways in the **Applications Accelerator** even for an organization that does not use Agile. I will be getting a lot of utility from the application and project portfolio management sections."

"Getting the big picture on where to start the process. Now knowing that I need to create Data Literacy in my organization and cultivate a group of people to work on our data strategy were highlights of the **Data Accelerator**."

"The **Infrastructure Accelerator** is a great course, well presented, professional, based on industry standards, AND a fantastic experience. Perspectives from others was wonderful."

IT Leadership Accelerators

Feedback

"Honestly this **Infrastructure Accelerator** was one of the best sessions I have ever attended. Jeremy Roberts is very knowledgeable and knows how to drive the conversation in order to have meaningful conversation and questions. Please continue to offer these for members of Info-Tech."

“I have a much better understanding of how the InfoTech blueprints fit together to help mature my **Security program**. This should help my team approach projects on our cybersecurity roadmap more efficiently. Achieved my objective of moving from a task and project based approach to policy, compliance and other key security program components toa more wholistic perspective.“

"Bill Holiday and Ryan Parsons delivered an outstanding **Project Management** class over the past five days! Their expertise, engaging teaching style, and ability to break down complex concepts made the learning experience both enjoyable and incredibly valuable. They encouraged insightful discussions and provided practical tools and strategies that are immediately applicable. Their passion for the subject matter was evident and truly inspiring. I’m grateful for the opportunity to learn from such skilled and knowledgeable instructors—thank you both for an excellent class!"

“The highlight of the **AI Accelerator** was the ability to interact with others in different industries. Also having direct discussion with the experts at infotech is great. The content was great.”

Women Leading IT

Program Details:

- 12 weeks – approximately 17.5 hours.
- Designed for senior level individual contributors, high potentials, and leaders in IT.
- Blend of online Learning, community forums & activities, and Instructor-Led Sessions.
- Flexible program delivery options available for individuals, groups and organizations.
- Certificate & PDU credit eligible.

Info-Tech's 12-week Women Leading IT Program integrates online learning, community forums, and facilitated discussions into one impactful experience. Our goal is that every participant comes away from this program with a clear vision for their own career, an actionable roadmap to get there and an expanded network of leaders in IT.

Key Topics Covered

Discover

- Driving greater self awareness
- Owning your Career & Brand
- Architect your Career Strategy

Deepen

- Building Confidence
- Leveraging your strengths
- Building and keeping trust
- Leading with influence and versatility

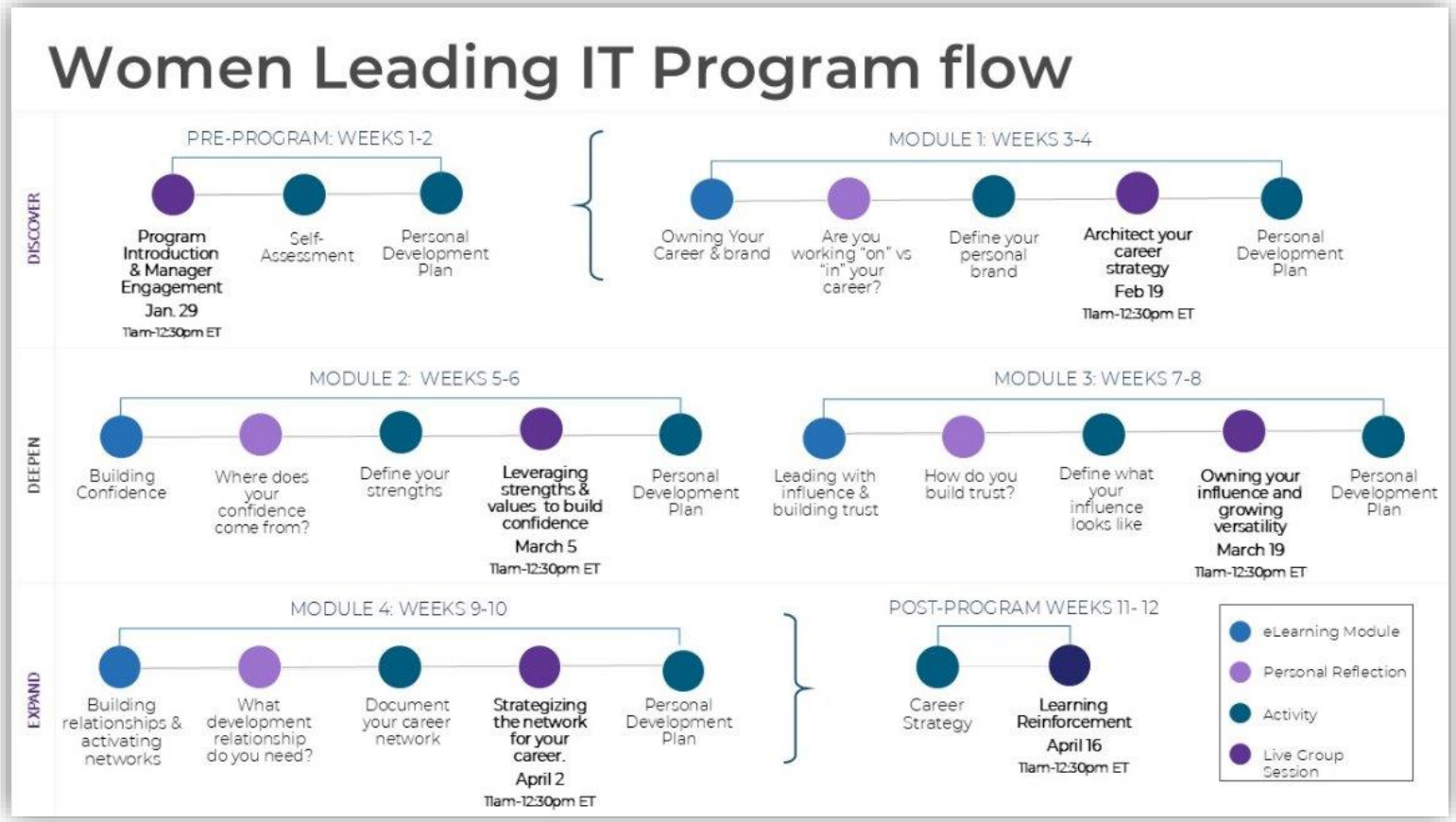
Expand

- Identifying and building key relationships
- Strategize & activate your network
- Build your career roadmap

Women Leading IT

Program Overview

Women Leading IT is a 12-week blended program that merges leadership training, peer networking, and career planning into a singular impactful experience.



Women Leading IT

Pricing

Pricing - If you have a member with an available workshop credit who might be interested in the new program, please contact Ryan.

This is a **Renewable product**. FY25 Pricebook HERE

Annual Training and Development Credit = Group of up to 10 participants

Annual Training and Development Credit = Group of up to 6 participants

Individual participant = $2700 USD (updated FY25 pricing)

Flexible enrollment options for every organization

	Peer Blended Program Quarterly Women Leading IT cohorts that bring together participants across industries and organizations. Participate as an individual or come as a group.		Enterprise Program Exclusive Women Leading IT cohorts of up to 30 women leaders in IT, tailored for your organization. Develop shared skills and build new connections.
Delivery Options	**Individual**	**Group**	**Organization**
Number of Participants Included	1	Groups of 6 or up to 10	11-30
Blend of eLearning, Community Events, and Live Facilitated Sessions	✓	✓	✓
Authentic Leadership, Confident Leadership, Influence, and Strategic Network Modules Included	✓	✓	✓
Learning Reinforcement and Certificate of Completion	✓	✓	✓
Pre-Program Leadership Engagement Session		✓	✓
Ongoing Participation Reporting		✓	✓
Participant Feedback Report		✓	✓
Live Sessions Tailored to Your Organization			✓
Flexible Start Dates and Times			✓
Private Program Exclusive to Your Organization			✓
	Single Participant $2,700 USD	Annual Training & Development Standard Team $27,000 USD Small Team $16,000 USD	Annual Training & Development Enterprise Team $47,000 USD

Women Leading IT

Who can attend? - This program is for Women in IT Roles as well as Aspiring Women Leaders in IT. Available for members or non-members. Public and private programs available.

How to book a scoping call? - If you have clients interested in this program please schedule a scoping call with Heather Leier-Murray through Salesforce

How do I register my client? Salesforce Process HERE

When are these programs? – Schedule HERE
Additional dates considered based upon demand.

Where can I find more details and sales collateral*?* - Sales Hub Link HERE. Communicating with your clients and prospects is easy! Use these templates - Email Templates. Email Template clients can use to request approval from DM: Request for Approval_Women_Leading_IT_Training Program.docx

Who can I talk with about this product? Logan Rohde. Heather is available to join your Sales calls if requested. Please book through SFDC

Women Leading IT

Feedback

Average Feedback Score **9.1/10**

Recent Women Leading IT Feedback

“This was a great course, I especially loved some of the ideas and conversations regarding women in IT.“

“Good experience. The class exercises and assignments helped to reinforce the concepts being taught.”

“Great course - although I have taken other leadership courses that covered most of these topics, I found the way that this was presented really resonated with me and hit home.”

Management Fundamentals

Program Details:

- 12 weeks of experiential learning
- Designed for New and Emerging Managers
- Blend of eLearning, Community Events, and Instructor-Led Sessions
- Enterprise and Peer Blended Programs Available
- Certificate & PDU Credit Eligible

INFO~TECH RESEARCH GROUP — SALES ENABLEMENT —

Key Topics Covered

Team Management

- Communicate Effectively & Build High Performing Teams
- Manage Performance
- Give Feedback & Coaching

People Development

- Delegate & Distribute Leadership & Create Accountability
- Navigate Difficult Conversations and Conflict
- Provide Meaningful Recognition Learn how to configure, train, and customize AI solutions to implement common use cases.

Personal Leadership

- Master the Management Mindset
- Build Key Resiliency Behaviors
- Craft a Personal Leadership Brand.

Management Fundamentals

Program Overview

Info-Tech's 12-week Management Fundamentals Program integrates eLearning, engaging online community events, and facilitated discussions into one impactful experience. This flexible setup allows managers to learn from any location, put new skills into practice, and receive peer feedback all with the full support of Info-Tech's skilled facilitators

Management Fundamentals

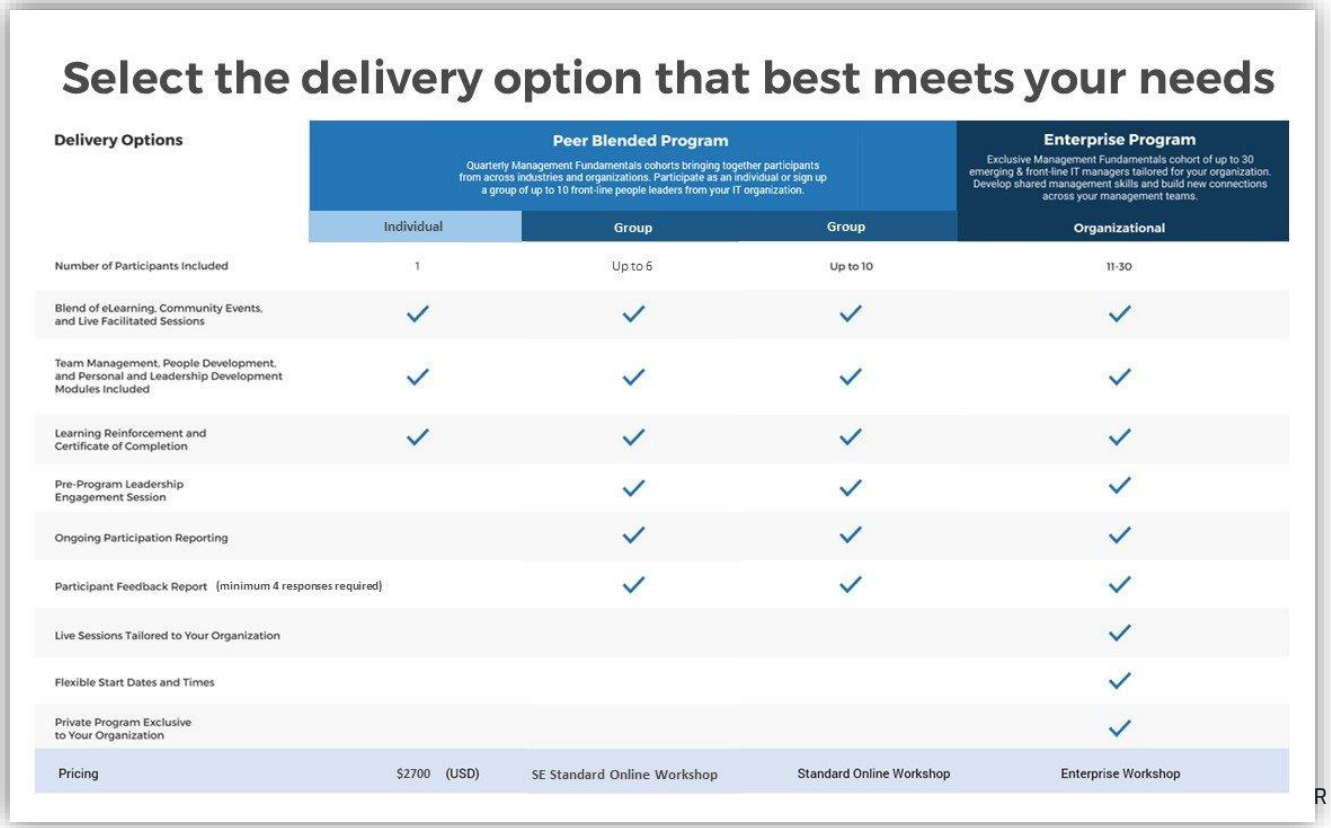
Pricing - If you have a member with an available workshop credit who might be interested in the new program, please contact Ryan.

This is a **Renewable product**. FY25 Pricebook HERE

Annual Training and Development Credit = Group of up to 10 participants

Annual Training and Development Credit = Group of up to 6 participants

Individual participant = $2700 USD (updated FY25 pricing)



Select the delivery option that best meets your needs

Delivery Options	Peer Blended Program Quarterly Management Fundamentals cohorts bringing together participants from across industries and organizations. Participate as an individual or sign up a group of up to 10 front-line people leaders from your IT organization.			Enterprise Program Exclusive Management Fundamentals cohort of up to 30 emerging & front-line IT managers tailored for your organization. Develop shared management skills and build new connections across your management teams.
	Individual	Group	Group	Organizational
Number of Participants Included	1	Up to 6	Up to 10	11-30
Blend of eLearning, Community Events, and Live Facilitated Sessions	✓	✓	✓	✓
Team Management, People Development, and Personal and Leadership Development Modules Included	✓	✓	✓	✓
Learning Reinforcement and Certificate of Completion	✓	✓	✓	✓
Pre-Program Leadership Engagement Session		✓	✓	✓
Ongoing Participation Reporting		✓	✓	✓
Participant Feedback Report (minimum 4 responses required)		✓	✓	✓
Live Sessions Tailored to Your Organization				✓
Flexible Start Dates and Times				✓
Private Program Exclusive to Your Organization				✓
Pricing	$2700 (USD)	SE Standard Online Workshop	Standard Online Workshop	Enterprise Workshop

Management Fundamentals FAQ

Who can attend? This program is for new or emerging managers. Available for members or non-members. Public and private programs available.

When are these programs? Schedules **HERE**
Additional dates considered based upon demand

Where can I find more details and sales collateral? Sales Hub Link here
Communicating with your clients and prospects is easy! Use these templates Management_Fundamentals_Scripts_Sales.docx
Email Template clients can use to request approval from DM: Request for Approval_Management Fundamentals Training Program.docx

Who can I talk with about this product? Logan Rohde
Heather, Ryan, Nick or Amanda are available to join your Sales calls if requested. Please book through SFDC

How to book a scoping call? If you have clients interested in this program please schedule a scoping call with Amanda M and Ryan.

How do I register my client? Salesforce Process HERE

Management Fundamentals Feedback

Average Feedback Score **9/10**

Recent Management Fundamentals Feedback

“I liked the section of crafting our personal leadership brand statement. This was not an exercise I have done before. I also liked that throughout the sessions there was an emphasis on identifying actions we want to implement within our teams”

AI Workforce Development

Future-proof your IT workforce with essential AI competencies.

- 12 weeks of experiential learning
- Access to expert AI Advisors
- Become Info-Tech Certified

Designed to build functional capability and skills to support the responsible, reliable, and effective adoption of AI through:

Standard Curriculum, Tailored Projects

We deliver on this by working with each learner to build a Personalized Development Plan (PDP) that includes a competency assessment for establishing baseline skill levels within the organization.

AI Virtual Labs

Learn how to configure, train, and customize AI solutions to implement common use cases.

Ready-to-Deploy Deliverables

Practical tools and process templates designed to help inform your AI deployment strategy based on your unique business requirements.

Real Assurance Of Skill Development

Structured assessment, a development scorecard, and coaching to ensure you walk away with the AI skills your organization needs most.

AI Workforce Development

Program Overview

The AI Workforce Development Program is a 12-week AI training program designed to help IT leaders and practitioners gain essential business and technical skills to support the responsible, reliable, and effective adoption of AI for their organizations.

AI Workforce Development

Pricing

Pricing - Standalone options for this product are below.

- Practitioner Track = $5,000 USD per seat.
- Leader Track = $15,000 USD per seat.
- Team Track = $28,000 USD per group, includes 1 Leader Track seat and 3 Practitioner Track seats.

This is a **Non-Renewable product**.
FY25 Pricebook HERE

	$5,000 USD	$15,000 USD	$28,000 USD
	AI Practitioner	IT Leader	AI Team*
Curriculum & Lectures	Live facilitator learning sessions on fundamental topics	Live facilitator learning sessions on fundamental topics	Successful AI initiatives require collaboration across IT experts, business domain experts, and other areas. **Form your core AI Team with 1 IT Leader and up to 3 AI Practitioners**
AI Sandbox	Lab environment access	Lab environment access	
Projects		One capstone project with practical deliverables, customizable to operational use.	
Personalized Development Plan	✓	✓	
Development Scorecard	✓	✓	
1:1 Coaching with an expert AI Advisor		✓	
Recommended roles	Business Analysts, Solution Architects, Data Architects, Project Managers, and more.	CTO, CIO, CDO, CISO, Director of IT, Head of IT, and more.	

AI Workforce Development

FAQ

Who can attend? This program is intended for IT leaders and AI practitioners seeking a practical blend of technical and business-focused AI competencies to help them implement high-value AI use cases for their organization. Available for members or non-members. Public and private programs available.

How to book a scoping call? If you have clients interested in this program please schedule a scoping call with Jai Hebel, Fritz Lean-Louis, or Logan Rohde.

How to Register? Use the “Add to Cybersecurity Development” button found on the Salesforce contact page of each learner to enroll them into a class.

When are these programs? Schedules HERE

Where can I find more details and sales collateral? Sales Hub Link HERE

Who can I talk with about this product? Isabelle Hertanto and Ian Mulholland.
Jai Hebel, Fritz Jean-Louis, and Logan Rohde are available to join your Sales calls if requested. Please book through SFDC.

AI Workforce Development

Feedback

Recent AIWD Feedback

“I really enjoyed the classroom sessions as well as the lab assignments as they were more interactive just like a classroom environment. The facilitator's experience and knowledge of the whole subject matter gave me really valuable insight and industry-related knowledge on AI & ML as a whole.”

Cybersecurity Workforce Development

The Cybersecurity Workforce Development program builds critical cybersecurity skills missing within your IT team and organization.

- Live Facilitated Sessions
- Security Analysts & Leaders
- 6 months - Average of 75 hours
- Info-Tech Certificate & CPE Credits

INFO-TECH RESEARCH GROUP — SALES ENABLEMENT —

What do you get?

Standard Curriculum, Tailored Projects

Identify organizational technical skill gaps and design a personalized development plan.

Build your team members' technical proficiency through projects tailored to meet your business needs and individual gaps.

Realistic Cyber Range Simulations

Build technical skills and experience running real-world scenarios.

Learn from practical exercises through live lab simulation in guided cyber range settings.

Ready-to-Deploy Security Deliverables

Use Info-Tech frameworks to create up to six deliverables including a Security Risk Register, Vulnerability Tracker, Intrusion Analysis and Threat Modeling, Data Classification Scheme, Firewall Configuration Baseline, and Incident Response Runbook.

Adapt the deliverables to your organization's gaps and requirements.

Real Assurance Of Skill Development

Validate your desired proficiency achievement using targeted assessments to individuals' goals.

Ensure participants learn the cybersecurity skills their organization needs when completing the program.

Cybersecurity Workforce Development

Program Overview

Info-Tech's 26-week Cybersecurity Workforce Development Program develops critical cybersecurity skills missing within your team and organization through a standardized curriculum with flexible projects tailored to the needs of the business, realistic cyber range scenarios, ready-to-deploy security deliverables, and assurance of skills development.

Create a Personalized Development Plan
Select Cybersecurity Analyst or Leadership Track
Diagnostic Assessment of Learner Knowledge & Skills
Create Learner's Competencies Profile
1:1 Coaching to Tailor Plan to Business Needs
Personalized Development Plan
Learn & Apply Technical Cybersecurity Skills
Comprehensive Cybersecurity Curriculum
C00 Cybersecurity Foundations
C01 Vulnerability Management
C02 Threat Management
C03 Security Risk Management
C04 Data Protection & Privacy
C05 Perimeterless Network Security
C06 Security Incident Management
Cyber Range Simulations
L01 Vulnerability Scanning & Penetration Testing
L02 Intrusion Detection & Response
L03 Application Security Testing
L04 DoS Attacks & Defenses
L05 Firewall & Network Configuration
L06 Systems Hardening
Organization-Specific Projects
P01 Build a Vulnerability Assessment Framework
P02 Complete an Intrusion Analysis for Threat Modeling
P03 Build a Security Risk Register
P04 Conduct a Data Lifecycle Security Controls Assessment
P05 Evaluate Perimeterless Network Security Vendors
P06 Develop Critical Incident Management Documentation
Evaluate Skill Development
Learner Performance Reviews
Summative Evaluation
Detail Next Steps
Employee Scorecard

Cybersecurity Workforce Development

Pricing

Pricing - Standalone options for this product are below.

- Analyst Track = $9,800 USD per seat.
- Leader Track = $29,000 USD per seat.
- Private Cohort = $112,350 USD per cohort, includes 2 Leader Track seats and 5 Analyst Track seats.

This is a **Non-Renewable product**.

FY25 Pricebook HERE

	$9,800 USD Cybersecurity Analysts	$29,000 USD Cybersecurity Leaders	$112,350 USD Private Cohort Minimum 2 Leaders + 5 Analysts*
Curriculum & Lectures	32 hours of live facilitator learning sessions on fundamental topics	32 hours of live facilitator learning sessions on fundamental topics	32 hours of **private** live facilitator learning sessions with **flexible start dates and live session times.**
Live Exercise & Cyber Range Simulation	Lab simulation & Cyber Range access	Lab simulation & Cyber Range access	Lab simulation & Cyber Range access
Projects	Up to 6 practical deliverables developed throughout the program, customizable to operational use with **tactical focus.**	Up to 6 practical deliverables developed throughout the program, customizable to operational use with **hands-on support** and a **focus on strategic business alignment, program management, and governance.**	Up to 6 practical deliverables developed throughout the program, customizable to operational use **based on the unique needs of the organization.**
Personalized Development Plan & Scorecard	✓	✓	✓
Additional leader-only curriculum & lectures		✓	✓
1:1 Coaching with a dedicated Cybersecurity Advisor		✓	✓
Security Leader Guidebook		✓	✓

*All additional seats beyond the minimum 7 receive a 10% discount off the standard price.

Training Progra
IT_Training_progra

Cybersecurity Workforce Development FAQ

Who can attend? The Cybersecurity Analyst learning track is best suited to individuals currently in cybersecurity analyst roles or those aspiring to shift into a cybersecurity function, and the Cybersecurity Leader learning track is best suited to individuals currently in cybersecurity leadership roles who want to refine their leadership and governance capabilities or those aspiring to adopt a cybersecurity leadership function. Available for members or non-members. Public and private programs available.

When are these programs? Schedules HERE

How to book a scoping call? If you have clients interested in this program please schedule a scoping call with Bob Wilson, Fritz Lean-Louis, or Logan Rohde.

How to Register? Use the “Add to Cybersecurity Development” button found on the Salesforce contact page of each learner to enroll them into a class.

Where can I find more details and sales collateral? Sales Hub Link HERE

Who can I talk with about this product? Isabelle Hertanto and Ian Mulholland. Bob Wilson, Fritz Jean-Louis, and Logan Rohde are available to join your Sales calls if requested. Please book through SFDC.

Cybersecurity Workforce Development Feedback

Recent CWD Feedback

“Course gave me full coverage of security basics and helped me to understand better concepts like risk and securityincident management and have new thoughts on privacy and how to deal with data classification and protection, Allcourse content was valuable and can be used after course. It was important in live webinars to see what tools othersare using and what issues they are experiencing in daily work. Really appreciate option to watch recorded webinarswhen not able to join every live class. I haven't had much time to work the LABs. There is no worse part in the course.”